

Report to the Commissioners, prepared by Lisa Sheppard, Director June 16, 2020

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2018 actuals
FY 2019 annual targets
FY 2019 actuals
FY 2019 actuals as a percentage of annual targets
FY 2019 actuals as a percentage of FY 2018 actuals
FY 2020 actuals to date
FY 2020 annual targets
FY 2020 actuals as a percentage of FY 2020 annual targets

The general target is 91.66% for FY 2020 to date, July 1, 2019-May 31, 2020, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- We continue to work with DPHHS to identify problems and suggest solutions related to Capstone, the state’s new data system.
- **Nutrition**
 - Although the dining rooms remain closed, we continue to record a few new “congregate” clients each month as meals provided to Meals on Wheels delivery volunteers are considered congregate meals.
 - Meals on Wheels clients have exceeded the target for the year and well-surpassed totals for FY 2018 and FY 2019 due in large part to the switch to all home-delivered meals in mid-March as a result of COVID. Some clients previously ate meals at the South Campus or local senior centers and will likely do so again when the dining rooms open. Others may go off home-delivered service as the guidance for older adults to stay at home eases, but many meet the normal criteria for the program and may continue indefinitely.
 - The average number of home-delivered meals provided per month pre-COVID was 4,611 compared to the 6,782 meals delivered in May (a 47% increase).
 - We are in the process of completing the annual survey.
- **Transportation**
 - Rides continued to be down substantially in May due to COVID, but were almost double the number of rides in April. We resumed the main Kalispell city bus route (Red and Green

Lines) on May 11th, which resulted in 937 rides and accounted for almost all of the overall increase for the month.

- We continue to provide paratransit/Dial-A-Ride service as usual. However, given that most businesses remained closed for the first half of May and the Governor's office and CDC continue to recommend older adults and other vulnerable individuals take additional precautions to avoid exposure, we provided only 36% of the paratransit/Dial-A-Ride rides we would have expected this time of year.
- Through the third week in May, we continued the weekly runs to transport volunteers from the Flathead and North Valley Food Banks to deliver food to those in need.

▪ **Information and Referral/Assistance**

- Outreach/Education efforts continue to outpace the target.
- Total contacts for the month continue to exceed what is typical for this time of year due to increased inquiries related to COVID.
- Staff fielded almost 300 calls in May specifically related to COVID.

▪ **Independent Living Services**

- The total "units of service" for all services combined continue to be substantially below target due to ongoing industry-wide paid caregiver shortages. Service delivery is now further affected by COVID. A number of existing clients continue to have their services on hold because they are concerned about potential exposure to the virus.
- Despite the reluctance of many older adults to allow attendants in their homes at this time, we are continuing to put new clients on service.
- While not part of our performance measures/workload indicators, staff made 105 "Friendly Caller" contacts in May – down from a high in April of 120 but still substantially more than the pre-COVID monthly average of 40.
- We will not conduct an annual survey this year due to the number of clients with suspended service as a result of COVID.

▪ **Benefits Counseling**

- The cost savings for clients and hours of service have exceeded the annual target due to Medicare Open Enrollment, which takes place October-December.
- We continue to provide benefits counseling via phone, email and fax.
- In April, we put our Medicare 101 class online and it has received almost 70 views to date.

▪ **Ombudsman**

- Nursing homes and assisted living facilities are still closed to outside visitors. Ombudsman continue to conduct all consults with facility staff, residents and families via phone or email.
- Consults continue to outpace pre-COVID levels.

See each section below for relevant updates on COVID-19 Response. We are continually re-evaluating the status of all our programs as the state moves through a phased re-opening. We have and will continue to consult with the Health Officer prior to making any changes. Notes on the current status are labeled "continuation" if nothing has changed since last month's report and "update" if new information is presented.

AOA Administration

Budget and Contracts

- We received federal/state allocations from DPHHS for FY 2021 and are working on the budget, which is due to DPHHS on 6/19/20. Total federal funds are \$448,498 (\$4,574 higher than our original FY 2020 allocation); state funds are flat at \$412,136. (update)
- FY 2020 Budget Amendments
 - Prior to COVID, we received notice from DPHHS of amended federal allocations for FY 20, which resulted in some relatively minor increases and decreases in specific funds and a very small overall increase.
 - As noted in last month's report, as a result of COVID, we have received and will be receiving additional increases in Older Americans Act Title III federal funding to assist in our immediate and emerging response and future preparations.
 - As part of the Families First Coronavirus Response Act (FFCRA), we received an additional \$84,279 in Title IIIC nutrition funds. We will be able to carry these funds forward into the coming fiscal year if necessary.
 - We will be receiving additional Title III funds through the Coronavirus Aid, Relief, and Economic Security (CARES) Act. We are able to carry these funds over into FY 2021. (update)
 - \$147,684 for Title IIIC nutrition services.
 - \$65,116 for Title IIIB supportive services
 - \$39,556 for Title IIIE caregiver support services (converting to IIIB – see explanation below)
 - Through the CARES Act, we will also receive additional ombudsman funds to be used to cover costs associated with remote work and alternative means of connecting with residents, families and facilities, but we do not yet know the full amount. This fiscal year, we will receive \$2,400 to purchase laptop computers. (update)
 - Both the FFCRA and CARES Act funds do not require a local match and, with the exception of Ombudsman funds, are intended to be spent prior to regular funding allocations and are available through September 2021. FFCRA funds may be used for expenditures as of 3/20/2020. CARES Act fund can be used effective 4/1/2020. (update)
 - Because of the state's Major Disaster Declaration, we have the ability to transfer 100% of funds between all Title III (B, C1, C2, D and E) and Title VII funds, including any funds carried over from fiscal years 2018-2020. We intend to convert the majority of funds carried over from FY 2019 and those to be carried over in FY 2020 into IIIB funds as they allow for maximum flexibility and can be used across all non-nutrition programs.
 - The amended DPHHS contract budget for FY 2020 based on the changes above is on the Commissioners' agenda for approval today. (update)
 - We are also receiving additional federal funding for transit as part of the CARES Act. MDT has not yet made an allocation by area. The funds do not require a local match and are intended to be spent prior to regular funding allocations effective January 20, 2020. MDT has not yet determined when funds must be spent and is not requesting a contract amendment at this time, but that may change.
 - We submitted changes to Finance for the upcoming county budget amendment. (update)

Building

- Although it continues to be recommended that older and vulnerable adults stay at home whenever possible, given changing guidance from the Governor's Office/DPHHS and in consultation with Hillary, we are beginning the process of opening our South Campus spaces and area senior centers for some in-person services. See below for more details.

HR/Staff Development

- We are working to fill open driver positions at Eagle Transit.
- We continue to work with HR to restructure some existing positions and request new positions related to Older Americans Act and transit increases.

State/Federal/Legislative Issues

- Area Agencies on Aging and senior centers are eligible to apply through the state for \$500-\$10,000 CARES Act grants. We are considering projects and encouraged area senior centers to apply.
- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
 - DPHHS in partnership with M4A applied for and is being awarded a \$300,000 grant from the Administration on Community Living to coordinate a statewide effort, led by Area Agencies on Aging, to meet emerging and ongoing needs related to COVID and its aftermath.
 - M4A received a \$100,000 grant from Blue Cross Blue Shield to support Area Agencies on Aging to provide additional services to older adults affected by COVID. M4A paid each Area Agency \$10,000 from the grant. We will use the funds to offer individualized emergency planning services for older adults in the Flathead (details will be reported in I&R/Assistance section below).
 - Lisa and Beth continue to participate in weekly conference calls (every Monday) with other Area Agency on Aging directors and DPHHS State Unit on Aging staff to share information about COVID responses and resources and to receive state/federal updates.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to us as members
 - n4a is providing valuable, updated information related to the national COVID response, federal funding and local/regional examples of creative problem-solving on the part of the aging network.

AOA Advisory Council

- We are looking to reschedule our meeting on July 9th to a later day in the month. If we are unable to meet in person at that time, we will meet via Zoom or conference call.

Outreach/Education/Media/Events

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 5/1/2020: "Meals on wheels expands eligibility," front page article; 17,500
- 5/4/2020: KGEZ monthly interview, 15,000
- 5/5/2020: Meals on Wheels flier distributed through Bigfork Food Bank; 100
- 5/15/2020: SMP fraud, COVID scams alert distributed through Meals on Wheels; 350
- 5/24/2020: Daily Inter Lake, full-page Volunteer recognition ad; 17,500
- 5/27/2020: Tele town hall on aging/fraud issues related to COVID, hosted by M4A, featuring Lisa and Attorney General Tim Fox; 291 participants (4000 contacts)

- 5/27/2020: Lisa part of panel on COVID and food insecurity on virtual townhall hosted by Montana Free Press
- May 2020: KGEZ, 48 ads per month, Meals on Wheels and Friendly Caller
- Medicare 101 class available on AOA website; 63 visits

Eagle Transit

- COVID service changes and precautions currently in place:
 - Green and Red Lines fixed routes resumed regular hours Monday, May 11th and the Orange Line resumed regular hours on May 26th. Buses are operating with a maximum of one person per seat for now, but we will re-evaluate as demand increases. (update)
 - The Tri-City Commuter between Kalispell, Whitefish and Columbia Falls resumed service on June 8th. (update)
 - The SPARKS route is suspended for the remainder of the school year. (continuation)
 - The fixed-deviated route in Columbia Falls continues on a reduced schedule, Tuesday only. (continuation)
 - Normal operation of the Whitefish fixed-deviated route continues M-F with one person per seat. (continuation)
 - Paratransit and Premium Dial-A-Ride service is provided as usual in Kalispell and Evergreen. We continue to attempt to limit the number of individuals to no more than two per bus per one-way trip whenever possible but will re-evaluate as demand increases. We are beginning to see a gradual increase in paratransit/Dial-A-Ride ridership as more businesses open and people can access non-emergency medical care. (continuation)
 - Food Bank runs ended May 22nd. (update)
 - Adjustments have been made to seating arrangements inside buses to ensure at least 6 feet between drivers and passengers. Plexiglass shields are being installed between the drivers' seats and passengers; five buses have been completed. (update)
 - No fares are being collected to reduce the possibility of exposure during exchange and in the counting process. We will re-evaluate quarterly. (continuation)
 - We are continuing enhanced cleaning of all vehicles and offices. (continuation)
 - We are providing drivers with paper and cloth masks, which they are required to wear. We were also able to obtain a supply of N95 masks for drivers through the health department. (update)
 - Offices remain closed to the walk-in public. There was almost no public visitation at the Eagle Transit office prior to COVID. All business is being done over the phone or via email. We will evaluate the need for in-person assistance on a case-by-case basis. (update)
- Montana Department of Transportation (MDT) and Federal Transit Administration (FTA):
 - COVID-related activities:
 - Staff continue to closely monitor all federal websites and national publications to determine guidance related to COVID and examples of transit system responses as well as CARES Act provisions. (continuation)
 - Staff continue to participate on FTA conference calls. (continuation)
 - As noted last month, we are receiving additional funding through the CARES Act. We have not received a specific allocation.
 - Per FTA guidance, MDT is reimbursing all expenditures for this fiscal year from January 20th to June 30th with CARES Act funds at 100%. They are also extending the 100% reimbursement for the 1st quarter of FY 2021. No local match is required and no reduction made for fare collections. (update)
 - All COVID-related leave is covered.

- We can request additional payment for any operational or capital costs that support us to prevent, respond to or prepare for COVID-related concerns or conditions (including negative economic impact on the community and/or the transit system itself) now and going forward.
 - MDT is setting aside some of the CARES Act funds for facility purchase/construction. (update)
 - We are in discussion with MDT about several projects.
- We requested and have been approved for two accessible vans that will allow for greater flexibility during distancing restrictions and will support a volunteer driver/Older Americans Act program during normal operations. The vans are 100% federally funded, no local match is required. The contract has been signed by Commissioners and MDT. We expect delivery of the vans shortly. (update)
- We requested and received one non-accessible minivan, which we received on 6/3/2020. The van is 100% federally funded, no local match required. Commissioners have signed the contract. (update)
 - MDT has begun our three-year compliance review process. Staff have been working on the self-reported desk review, which is due June 30, 2020.
- Outreach/Education/Media/Special Events:
 - To satisfy federal regulations, daily radio ads ran on KGEZ.
- Operations:
 - We are looking at the feasibility of special recreation runs this summer for older adults and the general public.
 - We are still planning to implement expanded service for older adults and people with disabilities, including using Eagle Transit staff directly and/or developing/implementing a volunteer driver program.
 - We continue to look at possible summer commuter routes outside Glacier National Park.
 - We continue to explore general public demand response options and related technology to increase service flexibility.
 - We continue to research the possibility of converting our buses to propane as it would offer significant costs savings on fuel. We will prepare a cost-benefit analysis for review by Commissioners, the TAC and MDT.
 - We're continuing to move forward with Mountain Climber rebranding efforts.
- Staff Development/Training:
 - Tom attended the virtual mini-conference offered by the Community Transportation Association of America (CTAA) last week.
 - We're continuing to work with HR to, with Commissioner approval, restructure some positions and add permanent and temporary positions in line with our FY 2021 budget as submitted to MDT.
- Transportation Advisory Committee (TAC)
 - The TAC met via conference call on 6/4/2020. Topics included Eagle Transit's COVID response, the current status of routes/services, CARES Act funding and an update on potential propane conversion.
- Glacier National Park
 - The white paper from the Volpe National Transportation Center (part of USDOT) commissioned by Superintendent Mow to summarize previous plans as a starting point for a transportation work group convened by GNP to include regional, state and local stakeholders should be completed in July.

Nutrition

■ COVID-19 Response

- The Governor's Office and DPHHS released new guidance regarding congregate meals and senior centers on 6/4/2020, allowing for re-opening of sites and offering operating recommendations regarding distancing, disinfecting, staff/patron screening, etc. (update)
- Given the new guidance, and after discussion with Hillary, we will support centers to resume social dining (congregate meals) on July 1st. (update)
- We will open the South Campus dining room in mid-July (date TBD) using a reservation system to manage the number of diners and meet distancing recommendations. Staff have completed a deep clean of all surfaces and equipment. An outside vendor will complete a deep clean/sanitizing of all floors in the kitchen, dining room and lobby prior to opening. (update)
- All those who choose to follow the ongoing recommendation for older adults to stay at home will continue to be offered the option of home-delivered meals and/or frozen meals for pick-up, up to five at a time. (update)
- Increased frozen meal delivery to Meals on Wheels clients for evenings and weekends will continue. (continuation)
- We are continuing to offer clients weekly "Snack Packs" with easy to eat, non-perishable items like granola and protein bars, trail mix, fruit cups, etc., along with Ensure and/or a roll of toilet paper on request. We will discontinue snack packs when we resume social dining service. (update)
- Safety protocols for Meals on Wheels drivers/delivery continue. (continuation)
- Staff continue to connect people to grocery/pharmacy delivery services. (continuation)
- We have substantially increased outreach regarding nutrition services, including PSAs, radio/TV interviews, ads, distribution of fliers (including in Food Bank deliveries), etc. (continuation)
- We stocked up on food/commodities and home-delivery supplies and have enough to sustain us at 600 meals per day for several months, although we have not yet reached that threshold. (continuation)
- We received N95 masks through the health department. (update)

- The annual survey was delayed because of COVID, but it has been sent out. (update)

I & R/Assistance/Ombudsman/Independent Living Services

■ General Information and Assistance COVID Response

- We are continuing to provide Information and Assistance and benefits counseling services by phone and email, but will offer in-person appointments as needed on a case-by-case basis. (update)
- Staff filmed a Medicare 101 presentation and it is now available online on the AOA webpage. Other Area Agencies on Aging around the state have requested permission to use the video for their clients as well. (update)
- Resource Specialists are providing more frequent check-in calls for existing independent living clients who want them and have expanded our Friendly Caller program. (continuation)
- Resource Specialists daily monitor updates on COVID benefits/resources and how COVID is impacting Medicare, Medicaid, SNAP and other programs critical for older adults. (continuation)
- Staff have developed and are constantly updating a community resource list specific to the Flathead to assist callers. (continuation)

- We completed the first phase of an expedited community assessment process to determine what needs arising from COVID are unmet and what we might do, on our own and with community partners, to better serve older adults as we all continue to deal with COVID and in future crises or emergencies. We've sent a summary of the results to those who provided input for the assessment. (update)
 - We've moved into the next phase of the assessment and are in the process of finalizing a survey targeting older adults in the Flathead that will be available to fill out online and in paper form. We will use a multi-media approach to encourage participation. (update)
 - The final phase will focus on plans/options to address identified needs and gaps in service. (update)
- We have begun to develop our individualized emergency planning services to be supported by a \$10,000 grant from Blue Cross Blue Shield to M4A. (update)
- Veteran Directed HCBS Program:
 - COVID response
 - The CARES Act includes flexibility in processes and procedures to allow enrollment and recertification of veterans without face-to-face contact as well as protections for payments to caregivers. Services to enrolled veterans have not changed. (continuation)
 - Despite the CARES Act allowing for flexibility, the MT VA has decided to temporarily suspend new enrollments, citing pending, non-COVID changes in the process. With the help of the Lewin Group (VA liaison), we are still attempting to get clarity on the details of the proposed changes and a firm timeframe for resuming enrollments. We have heard from Ft. Harrison that new enrollments will not resume until at least late July or early August. (update)
 - We continue to have 37 vets enrolled, down from a high of 43 in February. We anticipate two vets will be re-instated on the program shortly. (update)
- Independent Living Services:
 - COVID response
 - Staff are routinely checking in with clients to make sure they are ok, assessing whether they are at increased risk and determining what other services we might connect them with. We are still making all contact via phone or email but will now arrange for home visits as needed on a case-by-case basis. (update)
 - Despite ongoing attendant shortages, the home care agencies we contract with have been able to find/keep attendants for most of our clients who want to continue receiving services at this time. (continuation)
 - Quite a few existing clients asked that their service be suspended temporarily for fear of exposure should attendants come into their homes. However, we are adding new clients as well. (continuation)
 - We've determined we will not complete an annual survey this fiscal year due to the number of clients who have asked to have their services put on hold. (update)
- Ombudsman Program
 - COVID response
 - Ombudsman staff are not visiting facilities in person. They are maintaining monthly contact with residents, families and facility staff via phone and email. (continuation)
 - Staff continue to monitor and follow-up on incident reports. (continuation)

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- COVID Response
 - As noted above, the Governor's Office and DPHHS released new guidance regarding congregate meals and senior centers on 6/4/2020, allowing for re-opening of sites and offering operating recommendations regarding distancing, disinfecting, staff/patron screening, etc. (update)
 - After discussion with Hillary, on 6/7/2020, we notified area senior centers about the new guidance and about the plan for resuming social dining on July 1st. Centers are not required to open for other activities as they may not be able to satisfactorily meet the recommended guidelines. Center boards are in the process of meeting to discuss their options. (update)
 - Funding to the centers continues as usual per Administration on Community Living (ACL) guidance. (continuation)
- Kalispell Senior Center
 - Prior to the June 6th guidance allowing centers to re-open, KSC arranged with Mark Campbell to use the Country Kitchen at the Fairgrounds for in-person activities as the space is large enough to accommodate appropriate distancing. The Center may want to continue this arrangement for those activities that have more participants than can be accommodated at the South Campus. (update)
- Whitefish Community Center
 - The Center applied for one of the \$10,000 Montana CARES Act grants but has not yet heard if it was awarded.
- Bigfork Community Center
 - Lisa, Beth, Whitney and Mike met via conference call with representatives of the Bigfork board on 5/21/2020 to talk about next steps in the planning grant process.
 - Whitney is looking for alternative space for the center to occupy as soon as is feasible.
 - Whitney is working on the RFQ.

June 2020 Report: Performance Measures Tables - May 2020 stats (FY 2020)

91.66%

MEASURE	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	May	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
# Receiving Independent Living Services	110	98	98	100%	89%	8	73	81	119	68%
# Receiving Meals on Wheels	374	465	401	86%	107%	24	496	520	465	112%
# Seniors Receiving Congregate Meals	1,404	1,200	1,538	128%	110%	7	1,395	1,402	1,200	117%
# Eagle Transit DAR Unduplicated Riders	331	450	333	74%	101%	11	248	259	450	58%
Client Savings from Benefits Counseling	N/A	N/A	N/A	N/A	N/A	\$5,394	\$569,208	\$574,602	\$400,000	144%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	92%	88%	93%	106%	101%	88%	86%	88%	88%	100%
Per Meal Cost of Nutrition Services	\$6.29	\$7.00	\$6.80	97%	108%	\$7.07	\$6.77	\$7.07	\$7.00	101%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	95%	97%	102%	100%	N/A		0%	97%	0%
% Overall Satisfaction with Independent Living Services from Annual Survey	90%	95%	97%	102%	108%	N/A		0%	90%	0%
Maximum annual number of transportation complaints	12	36	4	11%	33%	1	13	14	25	56%
WORKLOAD INDICATOR	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018		Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
Nutrition						May				
Total Meals	80,639	80,000	78,515	98%	97%	7,878	74,285	82,163	80,000	103%
MOW	47,409		46,658	N/A	N/A	6,782	48,754	55,536		
Social Dining (Congregate)	33,230		31,857	N/A	N/A	1,096	25,531	26,627		
Nutritional Assessments Conducted	1,846	2,000	1,858	93%	101%	44	1267	1,311	2,000	66%
Transportation						May				
Total Ride Count	99,104	90,000	116,017	129%	117%	2,125	82,266	84,391	100,000	84%
Paratransit/Dial-A-Ride Count	31,645	30,000	26,784	89%	85%	792	17,805	18,597	30,000	62%
City, Commuter and Other Ride Count	67,459	60,000	89,233	149%	132%	1,333	64,461	65,794	70,000	94%
Eagle Transit Outreach/Special Events	42	15	31	207%	74%	1	39	40	25	160%
Information and Referral/Assistance						May				
Outreach, Information, Referral Contacts	19,429	18,000	26,014	145%	134%	2,388	19,268	21,656	18,000	120%
Outreach/Education/Media Efforts	116	120	129	108%	111%	9	115	124	120	103%
Independent Living			66%			May				49%
Homemaker Hours	2,005	1,324	1,433	108%	71%	178	1463	1,641	2,000	82%
Escorted Transportation Rides	2,314	1,391	886	64%	38%	60	590	650	2,174	30%
Respite Hours	2,079	3,250	1,793	55%	86%	196	1256	1,452	2,857	51%
Comm. Support/Sr. Companion Hours	1,310	1,176	508	43%	39%	0	383	383	1,471	26%
Personal Care Hours	231	65	146	225%	63%	26	124	150	174	86%
Benefits Counseling						May				
Benefits Counseling Hours of Service	502	450	1,193	265%	238%	34	636	670	500	134%
Ombudsman						May				
Ombudsman consults/cases opened	1,250	1,100	1,116	101%	89%	169	1127	1,296	1,000	130%